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ABSTRACT

Since 1969, Eugene Public Schools District 4J, Oregon, has experienced enrollment decline. More specifically, partly because of population migration patterns, the district is suffering from two interrelated problems: (1) overall loss of students and (2) under-capacity schools in some neighborhoods and over-capacity schools in others. Enrollment decline problems are very complex and affect and are affected by a number of different issues. The oversupply of staff and space in some schools makes necessary the careful consideration of whether and how to begin reduction in force and school closure. Deciding whether to undertake these courses of action and how to implement them requires a myriad of additional decisions, involving enrollment projections, program and staffing projections, school costs, public relations programs, equality of educational opportunity, alternative use of school space, land use and development, the neighborhood school concept, busing, and student/teacher ratios. These decisions even touch on such diverse considerations as inservice training, the comprehensive high school, and need for a management information system. Each decision will affect every other decision. Handling these problems effectively depends largely on good communication and careful planning. (Author/JM)

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FACING DECLINING ENROLLMENT: CONSIDERATIONS AND PROCEDURES

Eugene Public Schools
School District 4J, Lane County
Eugene, Oregon

May 1978

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WHAT IS THE PROBLEM?

CHAPTER ONE:

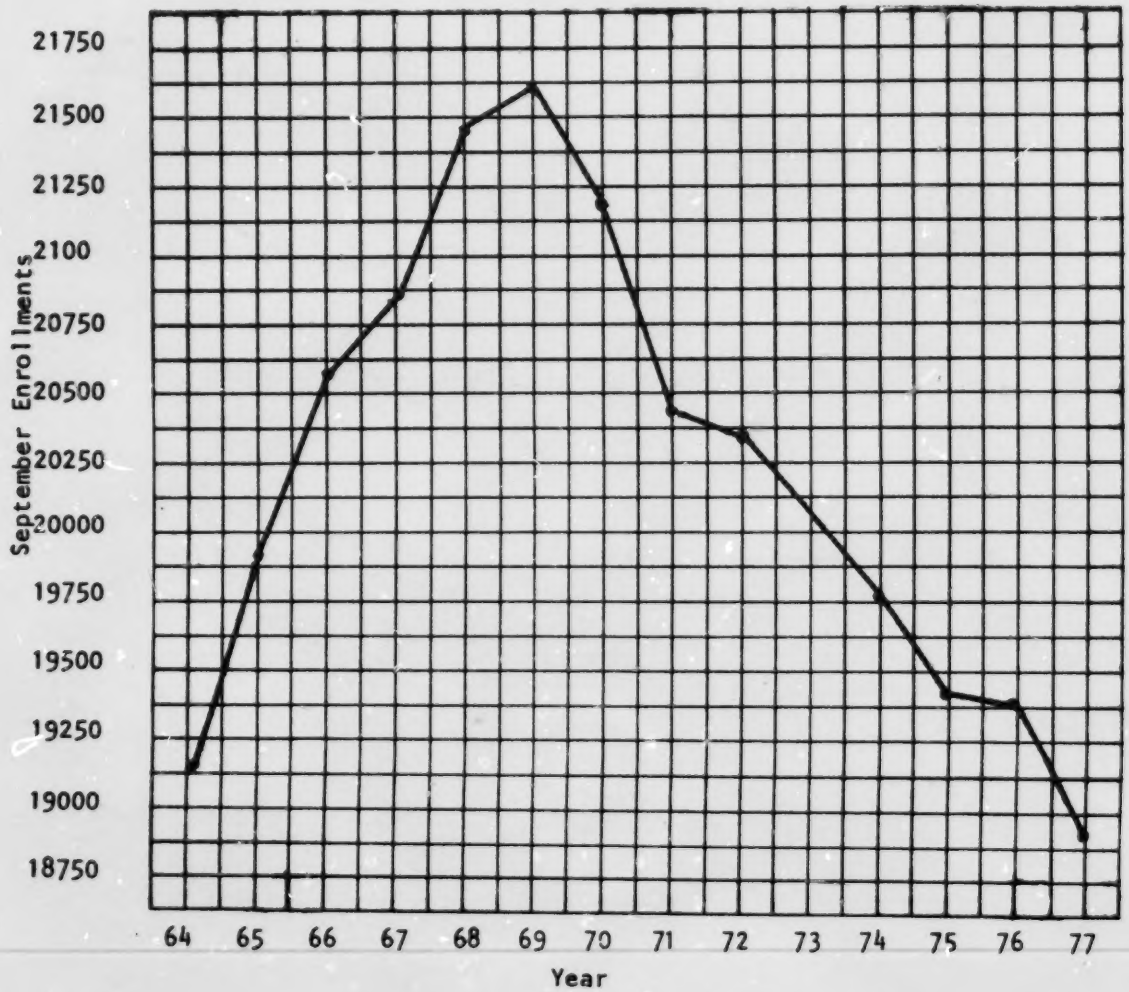
OVERVIEW

A little neglect may breed great mischief;
for want of a nail the shoe was lost; for want of a shoe
the horse was lost; for want of a horse the rider was lost;
and for want of a rider; the battle was lost.

Benjamin Franklin

Enrollment is declining in the Eugene Public Schools. Since 1969, the district has been experiencing a steady decline in the number of students enrolled in grades one through six. A picture of total enrollment in grades one through twelve in District 4J over the last 13 years looks like this:

DISTRICT ENROLLMENT, GRADES ONE THROUGH TWELVE, SINCE 1964



This picture does not include kindergartens, whose enrollment has also been declining since their institution in 1974. By all indications, the overall decline will continue until at least 1982, when enrollment may begin to rise again slowly.

The small elementary classes moving through the school system mean that 4J's high schools will be reduced by at least 25 percent in the next four years. The graduating senior classes will be replaced by smaller and smaller incoming classes.

Enrollment is not declining in all schools, however. At the same time schools in older and central Eugene are operating under capacity, a few on the periphery are operating over capacity. This discrepancy between low urban and high suburban enrollment promises to get larger.

Actually, therefore, the district is suffering from two different but interrelated problems:

- overall enrollment decline
- under-capacity schools in some neighborhoods and over-capacity schools in others

A COMPLEX ISSUE

In many ways, the issue of enrollment decline in the district is like Ben Franklin's saying quoted at the beginning of this report. "For want of" students, a large number of issues in the district are going to be affected, many of which are not readily apparent. Whether the chain of events is going to result in the "loss of the battle" depends largely on thoughtful planning and leadership from district board members and administration.

Some of the many issues affected by declining enrollment in Eugene include state aid, educational costs, teacher hiring and layoffs, community support of schools, equality of educational opportunity, possible school closures, the comprehensive high school, and even teacher inservice training.

The chain of cause and effect goes the other way too. Declining enrollment is itself affected by a great many things. Among these are birth rate, population migration, dropout rates, nonpublic school programs, transportation patterns, employment opportunities, special education program

changes, proposed school boundary changes, and land use and housing development in Eugene.

The tale about the "loss of a nail" is in at least one important sense very different from the situation concerning declining enrollment. In that story, each thing directly affected only one other thing. In our story, many things simultaneously affect many other things. For example, land and housing development in Eugene both affects declining enrollment and may be affected by it; teacher layoffs and increased educational costs will affect school-community relations; a possible moratorium on teacher hiring will affect the type of inservice teacher training needed.

Because of these interrelated causes and effects, any steps taken to solve any parts of the problem of declining enrollment will ultimately affect many other facets of the problem.

The policies developed for reduction in force (RIF) for teachers will have to be closely coordinated with decisions concerning what to do about excess school space and whether to close under-capacity schools. All these decisions will have to take into consideration skyrocketing school costs coupled with the lowering of aid calculated on a per pupil basis. The importance of preserving programs like comprehensive high schools, special education, and affirmative action will have to be carefully considered. Changes will all have to be made within the context of equal educational opportunity for all students.

Most of all, how all these problems are handled will affect the community's support of its schools. In districts like those in Salt Lake City, Utah, Evanston, Illinois, and Newton, Massachusetts, school boards and administrators acted in response to declining enrollment without careful long-range planning and community involvement. The results were bitter controversy. In Salt Lake City and Evanston, superintendents were forced to resign; in Newton, the school board was voted out of office. Yet surprisingly, in these same districts, when the problem was later tackled with well thought-out plans and community relations programs, the needed changes were made smoothly.

WHY DECLINING ENROLLMENT?

In Eugene and Lane County, many of the toughest problems faced by city and county government are those associated with rapid growth. It is ironic that at the same time the school system is wrestling with problems of enrollment decline. This paradox is brought about by two factors: declining birth rate and population migration.

●Birth Rate

Throughout the country, people are marrying later and having fewer children. Eugene is no exception. In fact, there is reason to believe this trend may be stronger in Eugene than elsewhere. Effects of the lowered birth rate first hit schools in 1969 when enrollment began to decline. The lowered birth rate is responsible for the overall enrollment decline in the 4J district. In 1975, the National School Boards Association report Declining Enrollment estimated that 36 percent of the nation's school districts had experienced declining enrollment. They predicted that between 1973 and 1982 total national K-12 enrollment would drop by almost five million students.

According to 4J's Research Specialist, Charles Stephens, fluctuating enrollments are nothing new to Eugene schools or to the nation. Traditionally enrollment is affected by cycles of growth and decline. What makes this particular period of enrollment decline so difficult to deal with is that it was preceded by the postwar baby boom. Nationally, huge numbers of new teachers and buildings were needed as the boom passed through the school system. If the goal of "zero population growth" is attained, this large number of teachers and buildings may never be needed again.

●Population Migration

Population migration patterns are responsible for the fact that decline in enrollment is especially severe in certain neighborhoods. The many schools operating at less that 75 percent capacity tend to cluster in the south and central city. The few schools that are crowded tend to cluster on the periphery of the city. There is some evidence to suggest that families with children are attracted to the new housing going up in the suburbs.

As schools in the South and Sheldon Regions have declined in population, schools in the Churchill and North Regions have grown. This means that 4J must not only deal with declining enrollment overall. It must at the same time cope with school population shrinkage in some neighborhoods and growth in other neighborhoods.

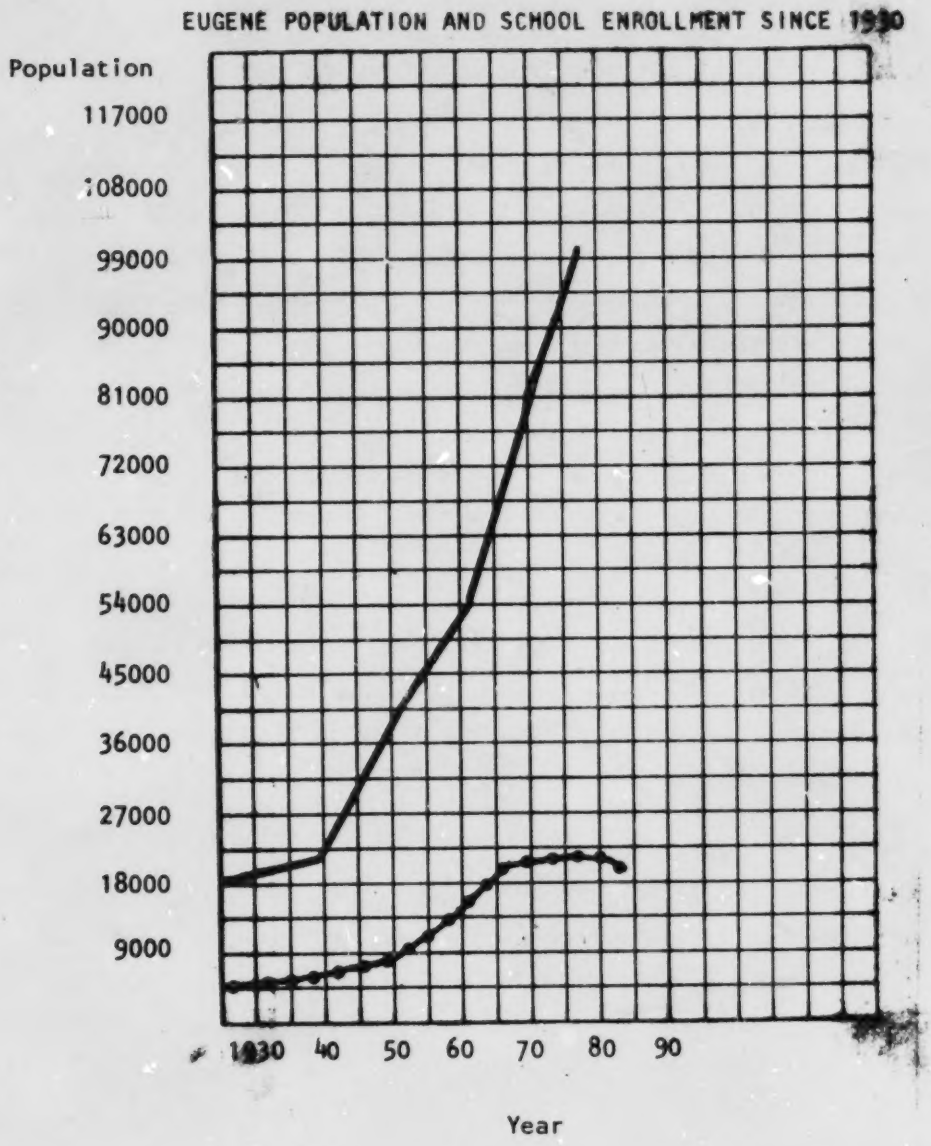
One reason some neighborhoods are experiencing declining enrollment is "neighborhood maturation". Susan Franklin's District Facilities Siting Report explains neighborhood maturation this way: As a residential area is developed, a majority of the new residents will usually be in the same age group. If families remain in the same home throughout their lives, a majority of the people in the neighborhood will have children in elementary schools at the same time. Fifteen years later the same homeowners will have no school-age children.

It is reasonable to believe that some of Eugene's older neighborhoods are experiencing just this phenomenon. Whether the housing in these neighborhoods will eventually "recycle" to younger couples is open to question. It will depend on whether housing costs in these neighborhoods remain low enough for young couples to afford.

●The Effects of Population Growth

But what about population growth? Isn't Eugene growing so fast that overall enrollment will rise again? The answer is: yes, but not soon.

The relation of overall population growth in Eugene to school population is shown by the two lines in the graph on the following page.



In the past, migration to Eugene has not brought in more children. It seems probable that families with children are attracted to less expensive housing in areas like Bethel and Springfield. This means that these children go to school outside the 4J district.

Yet the trend will probably eventually change. Both the Small Schools Task Force Report and Charles Stephens agree that, because of population migration and possible increased birth rate, 4J enrollment will probably be up again by the year 2000. Yet the year 2000 is 22 years away. Problems associated with reduced enrollment are here now and will get worse before they get better. It will be impossible to merely wait for 22 years and hope these problems will go away.

CHAPTER TWO:

HOW SEVERE IS IT?

Even if birth rates and migration do go up, one fact is almost indisputable: Eugene high schools are going to experience drastic drops in the next five years. Between spring of 1977 and fall of 1977, enrollment dropped in senior highs by approximately 350 students. Charles Stephens estimates that from 1977 to 1982 senior high enrollment will drop by 1,202 students. His projections rest on firm data; these students are easy to count because they are already in school.

Traditionally 4J has been very accurate in five-year projections of senior high enrollment. Projections made in 1972 for senior high enrollments in 1977 were extremely accurate (an error of less than 2 percent). Junior high projections (which are traditionally even more accurate) predict the loss of 177 more students by 1982. Elementary projections (which are more difficult to make accurately) envision a drop of 181 more students.

According to statistics from Charles Stephens, 12 elementary schools in March 1978 were only 80 percent full or below (assuming program capacity to mean full). Of these, seven (Patterson, Parker, Dunn, Laurel Hill, Lincoln*, Willard*, and Willakenzie) were below 70 percent. Three schools (Dunn, Laurel Hill, and Willakenzie) were operating at 59 percent of capacity. At the same time, four schools (Condon-Magnet Arts, Crest Drive, Fox Hollow, and Magladry) were operating above 100 percent.

Of junior highs, two (Spencer Butte and Jefferson) were operating below 80 percent, while Kelly and Kennedy were at 101 percent and 107 percent respectively. No high school was full, with Churchill at 97 percent, South Eugene at 91 percent, North Eugene at 99 percent, and Sheldon at 83 percent.

EFFECTS OF DECLINE

●Current

Many of the current effects of declining enrollment are obvious and

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* Lincoln and Willard also housed programs not included in these totals

have already been touched on. No new teachers are being hired. Schools are operating under capacity.

Other effects are less immediately obvious. At present, there is an unequal allotment of school space among students. At the same time some schools are crowded, others enjoy surplus space.

Another effect not obvious to everyone is that as enrollment declines, cost per pupil goes up. It is easy to understand how a rise in enrollment can cause a rise in costs. New facilities and staff are needed. Yet how can enrollment decline cause costs to go up?

In Declining Enrollment the National School Boards Association explains that when enrollment drops by one student, many of the costs associated with that student do not immediately disappear. The cost for utilities and maintenance of facilities remains the same. Until a whole classfull of students of the same age is lost and the number of staff drops, the cost for teachers remains the same. It may take an even longer time before the cost for administration is affected. The National School Boards Association estimates that it takes three years or more before the loss of a modest number of students enables a district to cut costs. And of course, inflation continues to drive costs up.

At the same time cost per pupil is going up, the amount of aid calculated on a per pupil basis is going down. This includes state aid, federal aid, county funds, federal forest fees, and the state common school fund. Oregon Department of Education's Coordinator of Statistics Jan Clemmer explains that loss of students affects not only the number of students used to calculate the state's basic grant. It also affects the rate of the grant. This is because the percentage of educational costs the state pays the district varies according to the wealth of the district. "Wealth" is calculated as the true cash value of district property divided by the number of students. When the number of students goes down, the district becomes "wealthier" in the eyes of the state and the percent of state aid lowers.

The formula for calculating state aid does include a cushion for districts experiencing declining enrollment. This cushion allows districts to count for state aid purposes 75 percent of students lost over the previous year. The cushion is based on the realization that when enrollment

drops, costs do not drop immediately. Yet this aid is given for one year only, not for the three years the National School Boards Association indicates is needed.

Another less obvious effect of enrollment drop is that needs for inservice teacher training change drastically. Most inservice training assumes growth rather than decline and deals with things like new programs and new materials. Teachers must learn to deal with retrenchment rather than growth, to function in an environment where fewer resources are available.

To date, 4J teacher inservice education has avoided examining enrollment decline. This means that teachers may be grossly unprepared for the profound changes that enrollment decline brings.

●Future

Many future effects of declining enrollment are merely extensions of current effects. Either teacher-pupil ratios will go down drastically or teachers will be laid off. Educational costs will continue to rise. New space will become available. The amount of state and federal aid will continue to fall. The inequality in the allotment of school space will rise. There may be a need for more transportation of students.

Other future effects will be new. It will become very costly to keep open all of Eugene's schools. It will be difficult to support four comprehensive high schools. Maintaining school-community relations and administrator-teacher relations will become more difficult.

Many of the solutions to these problems will revolve around one thing: money. How much is the community willing to pay to keep schools open, retain teachers, and solve the many other problems related to declining enrollment? But equally important will be good human relations. As Dr. Philip Piele, director of the ERIC Clearinghouse on Educational Management put it, "Style will be as important as substance. In an issue like this, it is always important to remember that we're not just dealing with numbers; we're dealing with people."

WHAT CAN BE DONE?

CHAPTER THREE:

PLANNING

The need for adequate long-range planning is so obvious and indisputable that it ought to go without saying. Everybody plans. Successful political candidates. Good foresters. Good teachers. Everybody knows that decisions made too quickly and in the midst of a crisis may be poor ones and create as many problems as they solve.

But if the need for good planning is so self-evident, why is it that every major report on declining enrollment talks about it so much? Why does everyone repeat that comprehensive long-range planning spells the difference between success and failure?

AVOIDING A CRISIS

The problem is that most school districts don't have time to plan. They are too busy solving crises. They are too busy fighting fires to have fire drills. The National School Boards Association in Declining Enrollment quotes Superintendent Roger Lowney of the Merrill Area (Wisconsin) Public Schools, who put it: "Many school districts are operating without adequate planning to accommodate the ever-changing demands of contemporary society. A great number of school districts operate on a crisis-oriented policy. This statement is neither complimentary nor perjorative. It is a real world reality."

It's almost too late for planning for declining enrollment in the 4J District. Enrollment decline has already hit Eugene schools. Avoiding a crisis will not be easy. Yet the sooner planning is begun, the better the chances for avoiding and handling crisis situations.

●Why Plan?

Dealing with underfilled schools and implementing a massive reduction in force (RIF) can easily become crisis situations for the school district and the community. It is extremely important that policies be developed carefully before they are needed. It takes time to collect the necessary information for decision making and to consider the many complex problems

involved. It takes time to inform and involve the community and staff sufficiently and to avoid violent reaction to change.

Adequate long-range planning is also necessary for the successful solution of many of the interrelated problems stemming from declining enrollment. Time is needed to develop successful cost-cutting efforts and to obtain supplementary funds. Thinking ahead about the effects of future development will make possible coordination with city and county planning offices. Time is necessary to close schools or to formulate programs to utilize surplus school space. Careful planning is above all necessary because of the complexity and range of all the issues involved.

●Who Will Plan?

The first step in planning for declining enrollment will be to determine who will do the planning. Options include school board, administration, staff, community, students, and representatives from teachers' unions. Who ought to be responsible for final decision making will be a matter for debate.

No matter who is given the final say, it is clear from experiences in other districts that successful planning includes ideas from a large number of people. The Educational Facilities Laboratories' nationwide survey on Surplus School Space concluded, "By now it is clear that the communities and school districts that are finding workable and acceptable solutions tend to be those in which there has been the broadest involvement of concerned citizens." Citizen task forces like those now studying declining enrollment in the Eugene area schools can have a strong influence on community acceptance of needed changes if they feel they have truly had input into decisions.

How this issue is handled will have ramifications on many other related issues. It will make possible community and staff acceptance of policies concerning RIF, surplus school space, and cost cutting. Involvement of staff and community from all areas of the district will ensure, too, that policies include equality of educational opportunity for everyone.

ESTIMATING DECLINE

●Basic Calculations

An early stage in planning is the collection of all the facts necessary

for making recommendations. The simplest part will be to establish a current picture of enrollment for both elementary and secondary programs in Eugene.

Current enrollment information needed for each elementary school includes:

- number of students in grades 1-6 (1-3 and 4-6)
- number of special education students by type of program and grade (for instance, resource room, self-contained classroom, and so on)
- number of kindergarten students
- total number of students by school

Information needed for each secondary school includes:

- number of students in grades 7-9 and 10-12
- number of special education students by type of program and grade level
- number of students in ungraded schools (such as the Opportunity Center)

Much of this information is easily obtainable.

The second step in information gathering will be more difficult. This will involve graphing enrollment projections for the next five years. Although ideally this projecting would be done for each school, an accurate prediction (less than 20 percent error) for a unit as small as a school is very difficult. Regional predictions are easier to make but are still tricky. Yet rough regional predictions must be made if the district is to be ready to solve the regional problems of declining enrollment.

Five-year enrollment projections done in 1977 for the entire district have already been mentioned. Subsequent projections will probably be very similar. Yet to understand fully the many facets of declining enrollment, it will be useful to look briefly at some of the information needed in making such predictions.

The first information needed is the number of births in the past few years. Children to enter first grade in 1978 were born in 1972, and those born in 1978 will be the first-grade class of 1984. The next step is to figure the ratio between births and corresponding first-grade enrollments. Because of population migration, the number of births will not exactly

correspond to first-grade enrollment six years later. This calculation could also be made more accurate by taking a census of preschool children.

To figure enrollment in higher grades, "cohort survival ratios" need to be calculated. Stanton Leggett (quoted in the National School Boards Association's Declining Enrollment) explains:

> That fancy term simply means the ratio between the number of children in one grade in a certain year and the number of children in the next higher grade the next year. (Example: if 100 children attend third grade one year and 98 attend fourth grade the next year, the cohort survival rate for grade four is 0.98.)

The National School Boards Association continues:

> Knowing the cohort survival ratio is important for planning; it is not sound to assume that because 100 children enter the first grade, there will be 100 children entering the second and third grades the following years. Planning on that basis will lead to an overestimation of the amount of manpower and number of classrooms needed.

After these ratios have been determined, other factors will need to be included. One of these is dropout rates. According to Dr. Philip Piele, director of the ERIC Clearinghouse on Educational Management, these must be watched closely, since nationally they are on the upswing. Piele also reports that private school enrollments appear to be growing on the national level. Whether these trends will affect Eugene remains to be seen. If they do, enrollment will be even lower than anticipated.

Another related factor is school transfer rates within the district Analysis of junior high school transfer patterns was completee by the 4J Planning Department in early spring.

●General Considerations

But these are only the most basic calculations. Other more general considerations must be included. These are the things that affect overall population growth and numbers of school children in each area. One consideration is age range of population in major residential areas. (This means the same thing as determining the stage of "neighborhood maturation".) This knowledge is helpful in calculating where children are more likely to

be living and in making predictions about future birth rates in each area.

Another consideration is population migration patterns. How many children are moving into Eugene each year? Where do they move? Where do young couples without children move? One technique for estimating future population migration was suggested by the Small Schools Task Force Report. A survey of realtors was taken concerning their opinion of the future elementary school population in certain areas. Of course, one problem with this method is that realtors have a personal investment in continued growth in areas where they sell property. If they predict school enrollment decline in an area, property values may fall.

In determining which neighborhoods are attractive to young families, several factors must be considered. One is transportation patterns. How can children travel to school? How safe are major routes? Where are the bikeways? How do people reach their jobs? Which neighborhoods give easy access to employment?

●Building and Land Use

One of the most important and complex factors to be considered in estimating future enrollment is residential building patterns and land use policy. Some of these issues have been outlined by Susan Franklin in the District Facilities Siting Report. She notes several areas that must be considered:

- ●the urban services boundary
- ●possible zone changes
- ●annexation of the River Road-Santa Clara area
- ●plans made by the Eugene City Council and Eugene Planning Commission for the South Hills and Goodpasture Island Areas

She also offers general descriptions and projections of growth for each school attendance area. These are based on information on vacant and buildable lands and current residential development activities.

To predict enrollment levels, two other questions must be answered: How many new dwelling units are projected in each attendance area? How many new inhabitants are typically produced by new dwelling units? This information was being gathered by the 4J Planning Department in the spring of 1978. It must be used very carefully. Projected developments aren't

always built. They are rarely finished at the time expected. Assuming that projected development is certain will result in overestimation of enrollment. Yet ignoring it altogether will result in gross underestimation.

●Current Recommendations

Susan Franklin's District Facilities Siting Report contains several recommendations that would affect future enrollment in Eugene. They are:

- ●encouragement of more "magnet" type programs in low enrollment schools
- ●change of regional school attendance boundaries
- ●addition of modular units and development of additional school sites to accommodate overflow from high enrollment schools
- ●better coordination with city and county policies such as the 1990 Plan and its continuing modifications

Implementation of these recommendations will change enrollment projections. Their impact must be considered.

Addition of magnet programs will not change overall enrollment, of course (unless they are attractive to potential dropouts). They may, however, change how enrollment is divided among schools. This is also true of changing attendance boundaries.

The development of additional school space likewise won't affect overall enrollment but it will affect whether some schools are filled over capacity.

Better coordination with city and county policies, of course, won't directly affect enrollment at all. It will, however, affect projections. Being clearly informed of factors like the projected urban services boundary, will make it easier to predict where population growth will occur. In addition, such coordination should include more district input into city and county policies like the 1990 Plan. The district should aim toward ensuring that development will not occur in ways that will overburden the schools.

Other recommendations to affect enrollment are those concerning implementation of P.L.94.142. This federal law demands that all handicapped students be provided with a free appropriate public education.

Districts must comply with the law or lose federal aid. One likely effect of this law is that more special education students will be added to the district's enrollment. Recommendations concerning P.L.94.142 are outlined in detail in Special Education in Transition: Review and Recommendations, by Lynn Neubauer and Jim Bardsley.

Another type of recommendation that may have future effects on enrollment is the city of Eugene's commitment to keeping the central city vital. If Eugene legislators can make the central city attractive to young families, then enrollment decline there may be curbed. What the 4J District can do to further this commitment to the central city is of course a separate concern. As will be discussed later, no matter how laudable the goal of revitalizing the city may be, whether education money should or legally could be used to subsidize it is a thorny question.

It ought to be clear by now that planning for declining enrollment is very necessary and very complex. To solve the problems that declining enrollment brings, careful calculations about its present and future location and extent must be made. An accurate and detailed body of information will serve as a firm base for the policy decisions that need to be made.

CHAPTER FOUR:

CUSHIONING THE EFFECTS

It is by now literally impossible to avoid the effects of declining enrollment in Eugene schools. Enrollment is down substantially. The amount of state and federal aid has already been affected. No teachers are being hired. Schools are operating under capacity.

It is possible, however, to cushion the effects somewhat. This does not mean that there are easy solutions to the problem. It does not mean that difficult decisions concerning reduction in force or under-capacity schools can be avoided. It does mean that steps need to be taken immediately to prevent a difficult situation from becoming a crisis.

CUTTING COSTS

As has already been mentioned, declining enrollment makes education more expensive per pupil. This is because costs for maintenance of buildings, staff, and administration do not go down immediately when a student is lost. Karen Sieradsky in Implications of Declining Enrollments for Schools quotes school administrator Robert Sealey, who explained:

> Transportation is a good example. It doesn't cost any less to put 50 students in a bus than it costs to put 70 students in a bus. So until you can reduce entire bus runs, you will not make a great deal of savings in transportation. The same thing is true in food services, where it doesn't cost a great deal more to make 130 lunches than it does to make 100. It doesn't cost any less for a custodian to sweep a room that has 23 students in it than one that has 30 students in it. It still takes 18 minutes.

Soon after costs per pupil go up, all aid that is calculated by number of students goes down. One of the first responses to declining enrollment can be to cut educational costs. Support from teachers and the community may depend on their realization that every effort has been made to reduce the budget before cutting staff or closing schools. Toward this end, it would be useful to widely publicize efforts at fiscal savings and reasons for making them.

●Finances

The first step in developing a plan for cutting costs is to establish

a complete picture of all revenues and expenditures. What funds are currently coming in and going out and for what purposes? In addition, future financial needs of the district must be forecast. To do this, demographic and economic projections must be used. In forecasting future needs, extra funds necessary to comply with federal laws such as P.L. 94.142 and Title IX must be included. These federal laws concerning special education and sex discrimination must be complied with. How much will it cost? Also important will be careful calculation of increasing costs brought about by declining enrollment itself. These may include costs of:

- operating under-capacity schools
- altering the student-teacher ratio
- additional transportation needed to redistribute students

Finally, the effects of declining enrollment on state, federal, and county aid must be precisely calculated. How much aid will be lost each year as enrollment goes down?

- Possible Budget Reductions

What are the best ways for the district to save money? Advantages and disadvantages of all available options for fiscal savings must be considered. Staff and community reaction will probably be most favorable to making partial cuts in many programs rather than eliminating a few programs completely. Areas to consider for initial budget cuts outside of reduction in force or school closure might be:

- supplies
- transportation for extracurricular activities and fieldtrips
- daily student transportation
- intra- and extra-mural sports
- extracurricular programs
- curriculum development and consultation
- staff travel
- staff development
- elementary art, music, physical education, counseling, library services
- administrative working time
- administrative services

- noncertified staff (aides, clerks, nurses, and so on)
- foreign language and other low demand curricular courses
- secondary art and music
- capital improvements
- maintenance
- energy use

Making these cuts will not be easy. Making most of them will be unpopular. For instance, it will be difficult to put a moratorium on capital improvements when some schools are filled beyond capacity. Also, to redistribute students, it may be necessary to spend more on transportation rather than less. In addition, cutting funds for sports and extracurricular activities is bound to be extremely unpopular with students and the community (who may argue that such activities prevent dropouts). Great care must be taken in making such cuts to be sure that they affect all schools and all students equally. Ensuring equality of educational opportunity is more difficult yet no less necessary in the face of declining resources.

It will also be difficult to cut administrative services and their supportive noncertificated staff because the jobs they do are not directly dependent on number of students. Even if a full quarter of the student population is lost, most administrative jobs do not become less time consuming. Areas like special education or Title I must still be administered. Planning, research, and evaluation must still be done; state and federal reports must still be completed; maintenance of schools must still be supervised; board requests for information must still be met. Finally, it will be difficult to maintain a high quality educational program if cuts are made in areas like curriculum development, foreign language, art, music, and library services.

OBTAINING MORE FUNDS

Another way to lessen the effects of declining enrollment is to attempt to obtain more funds. More local funds can be obtained through referendum or more state aid through legislation. Neither kind is easy to get.

Before implementing a massive reduction in force or school closure program, it will be important to try to keep schools open and to retain teachers by asking the community for more money. A campaign to "Save Our Staff" or "Save Our Schools" could be launched.

Success or failure, such a referendum may be the only way of clearly determining community priorities. How much is the community willing to pay to avoid laying off teachers? How much will it pay to keep schools open? How much will it pay to avoid busing students? How much are citizens in growing neighborhoods with over-capacity schools willing to subsidize under-capacity schools? It will be important to let the community know exactly what the price tag is for retaining teachers and underfilled schools and then find out what citizens are willing to pay. Even if a referendum fails, it will be an effective way to make the public aware of problems the district faces.

Obtaining more funds through referendum won't be easy given the fiscal conservatism of the public right now. Obtaining more state aid may be even more difficult. A state legislature that just recently voted to raise the percentage of educational costs supplied by the state will be extremely reluctant to vote increased funds. The citizens' mood of fiscal conservatism likewise infects the legislature.

Some states have instituted longer "grace periods" than the one-year period provided in Oregon to declining enrollment districts. Illinois allows school districts to select the higher of the best six months' average daily attendance (ADA) of the two previous years. Colorado allows districts to use the largest of the following three ADA entitlements: the first year preceding the budget year; the second year prededing the budget year; an average of the three years immediately preceding the budget year. Lobbying for similar adjustments may be productive in Oregon.

PUBLIC RELATIONS

Every major study of declining enrollment across the country stresses the extreme importance of an adequate public relations program. The National School Boards Association in Declining Enrollment notes:

School boards throughout the country continue to be plagued by lack of community support, and many believe that it is because they lack good public relations programs. It is particularly important that a school district have a good public relationship in periods of declining enrollment.

The solutions to the problems created by declining enrollment do not make school boards and administrators popular with staff and community. Reduction in force, school closure, and cost-cutting programs often engender violent reactions from everyone. If the public is to understand the enormity of the problems and the necessity of the solutions, it must be informed. Wise use of the media will be extremely important. News releases should be widely disseminated. Flyers may be sent home with students. Declining enrollment should be a topic of discussion for neighborhood and school groups. Eugene must be told of the problems facing the school district immediately so that changes will not come as a shock.

Above all, the board and administration must make every effort to communicate their genuine concern about the negative effects of declining enrollment. They must show their understanding that budget cuts, reduction in force, and school closures are traumatic experiences for everyone. Board and administrators must help the community see that the problems of declining enrollment will demand sacrifices from everyone in the community, and that citizens cannot look to the board and administration for easy solutions.

MAKING USE OF NEW SPACE

Most studies of declining enrollment agree that closing schools should be a last resort for school districts. Before schools are actually closed, financially feasible ways to utilize excess space ought to be explored. In making decisions about how to use excess space, two things must be remembered:

- Enrollment is not declining in all schools or all neighborhoods.
- Neighborhoods with over-capacity schools may not be willing to subsidize under-capacity schools in other neighborhoods.

●Improving Programs

The simplest and most expensive way to utilize excess school space is merely to improve programs. Excess space can be used for things like art, music, drama, or student lounges. In making a decision to use space in this way, the cost to the district must be carefully calculated. Besides expense, the most difficult problem with such a solution is that it does not benefit all schools and students equally. While some students are luxuriating in lots of space and rooms for special programs, others are overcrowded. Overcrowded neighborhoods may have a right to demand equal amounts of space for their students.

●Reorganizing Grade Structure

Reorganizing the grade structure is one possible way to redistribute students more evenly. It may be useful when attempting a reduction in force. Aside from its facilitation of reduction in force, reorganizing the grade structure allows more efficient use of school space only when some grades in a neighborhood are over capacity while others are under capacity. One method of reorganizing the grade structure -- the institution of middle schools and four-year high schools -- has been suggested as a solution to declining enrollment problems in Eugene. This method will be helpful only if elementary schools need to lose students while junior high and high schools need to gain them. Otherwise, moving grades from one under-capacity school to another makes no more sense than robbing Peter to pay Paul.

One possible plan might be to close one regional junior high school and move all that region's ninth graders to a regional four-year high school. Presumably the high school would then be operating up to capacity, as would the junior highs. Yet accompanying this, as has been suggested, with transfer of sixth-grade students from under-capacity elementary schools to "middle schools" would not solve overall regional under-capacity problems. Grade reorganization may become more useful in five or ten years when elementary enrollment may begin to rise again.

●Changing Attendance Boundaries

Changing attendance boundaries may be one way for more students to use excess school space. If boundaries can be altered so that students

in crowded neighborhoods can be moved to underpopulated schools, space will be used more efficiently. There are several reasons why this is not a magic answer to space utilization problems. One is that enrollment is under capacity over the district as a whole. This means that there are not enough students districtwide to fill all schools, no matter how boundaries are redrawn. Another is that changing boundaries can only be of limited use without transporting students across the district. In spite of the state's commitment to pay 50 percent of district transportation costs, this is expensive. More importantly, parents may not like it. Parents, especially those of elementary students, are strongly committed to the neighborhood school concept. They may simply refuse to have their children bused to other areas.

On the other hand, there is evidence that limited boundary changes may be somewhat useful. Susan Franklin in her District Facilities Siting Report suggested several boundary changes. These include changes in boundaries

- between Churchill and South Regions
- between selected elementary schools in all four regions.

Effects of such changes on enrollment must be carefully calculated. Like Franklin's recommendations, future boundary changes must consider district transportation patterns.

In spite of the sacredness of the neighborhood school concept, there is some reason to believe that Eugene residents may not react violently to busing of students from over-capacity to under-capacity schools. Although newspapers have been filled with horror stories concerning busing for desegregation, even this type of busing has been successfully implemented in some districts. Districts like Pasadena, Stockton, and Berkeley, California, have implemented massive busing for desegregation plans without incident. Presumably a busing plan that did not include the explosive question of desegregation would be even easier.

Finally, a limited amount of busing is already proceeding successfully in Eugene. Because of overcrowding, students in what used to be part of the Edgewood School attendance area are being bused to Dunn School. In addition, kindergarten children are bused from Awbrey Park to River Road. Eugene may remain small enough during the next few years to allow cross-

district busing of students in a reasonable amount of time. Success of such programs depends largely on wise district leadership and public relations programs.

In implementing a busing plan, it is imperative to learn from other districts' attempts at busing. A survey of well-accepted busing plans indicates that all include

- wide community involvement and an excellent public relations program
- an efficient transportation system
- strong support by administrators and board members
- assurances to parents that students are being bused to schools with excellent teachers and high quality programs.

●Encouraging Magnets

One way to utilize extra space more effectively may be the institution of more magnet programs in low enrollment areas. Programs like the Condon-Magnet Arts School attract students from all over the district. Districts instituting magnet programs to promote desegregation have had good success. Parents seem eager to place children in nonneighborhood schools for special programs. Parents wishing to institute magnets in low enrollment areas should be especially encouraged.

●Finding Other Uses For Space

One of the most successful ways districts across the country have met the problem of excess space has been to find other uses for it. Some of these uses save money the district would otherwise pay for facilities. Others actually bring in funds. When parts of underfilled buildings can be converted to other uses, it can become financially feasible for schools to remain open.

There are two types of education-related uses for classroom space that can help the district save money. One is to convert classroom space into administrative and central office uses. Another is for storage of furniture or supplies. In either case, the amount the district is currently paying for such space must be carefully calculated, together with necessary remodeling costs.

Leasing out parts of schools is another way to keep underfilled schools open. This technique has been tried with success by districts across the country. According to the Educational Facilities Laboratories' report on

Surplus School Space, the Wilkerson Elementary School in Washington, D.C. leases surplus space to a branch of the public library. Kalamazoo and Springfield City, Michigan, rent classrooms to local private schools.

A variation on this type of arrangement is now being tried in Eugene in the community schools program. It has been projected that the city of Eugene in 1978-79 will contribute $85,768 to subsidize community use of the schools by everybody from the Boy Scouts to community volley ball teams. Yet chiefly because of administration costs, this program costs the district more money than it generates (for 1978-79, the total cost to the district is projected to be $103,056). The feasibility of converting the program to a profit-making venture as a way of staving off school closure ought to be considered. Any additional plans to lease classroom space must be integrated with this program.

One of the prime candidates for leasing school space in Eugene, Lane Community College, has up to now shown little interest in such arrangements. Whether the newly elected LCC Board of Education will be more interested in sharing space remains to be seen.

Investigation into leasing school space should include several considerations:

- the lessor's compatability with K-12 programs
- legal constraints on use of school space
- the necessity for someone to undertake full-time supervision of the programs

The National School Boards Association in Declining Enrollment sums up its discussion of ways to share school space this way

> In sum, when a school district determines that excess space is too costly, there are ways to share, sell or lease space that enhance the role of the school in the community. Besides providing alternative educational and community activity facilities, the school also benefits from the expanded programs that outside users bring to the facility. In addition, when sharing or leasing, the district maintains control of the property as a precaution against future increases in population.

BETTER COORDINATION WITH LOCAL DEVELOPMENT

Eugene schools with extra space are not located in the neighborhoods that need them. This discrepancy between facilities and children has

been called "locational mismatch". One way to prevent future locational mismatch may be district coordination with and influence on local development.

●Coordination With Developers

One way to influence local development is to ask developers to cooperate with the district by putting development in areas with sufficient school space. The 4J Planning Department is already preparing Development Information Packets for local developers. These packets will contain the following information:

- ●how concentration of development in some areas is creating severe problems for local schools
- ●a survey of vacant land and children per dwelling unit in each attendance area
- ●the district's recommendation concerning areas where development would not overburden schools
- ●courses of action that the district may take if developers continue to disregard school services when locating developments

In addition, developers may be asked to provide land or funds to help defray cost of new schools in crowded areas. Educational Facilities Laboratories notes in Surplus School Space that "such action has been taken in many districts with the cooperation of the builders, who use the availability of a new school as a selling point."

●Coordination With City-County Planning Commissions

Another way for 4J to help correct the problem of locational mismatch is to coordinate with local planning commissions. In fact, the Oregon land use planning statutes now demand such coordination if districts wish the right to file complaints to the Land Conservation and Development Commission (LCDC) about city or county comprehensive plans.

Statements of agreement with city and county commissions are now being drawn up by the 4J Planning Department. These statements principally assure that the city and county will be informed of and will consider school district needs in comprehensive planning and consideration of development proposals. Currently 4J is joining with other districts and the University of Oregon in an effort to coordinate data about population and land use that could be very helpful to city and county planning

commissions. Every effort should be made to make sure that these commissions are aware of such comprehensive data-gathering efforts.

The full effect of agreements with planning comissions is not entirely clear. Attorney General Jim Redden has, however, already stated in a recent opinion that countries must at least consider how much space is available in local schools when approving subdivisions.

Even stronger pressure on developers might be brought by legislation requiring that developers provide land or money for schools when development creates a need for more school space. Similar legislation might require availability of school space as a prerequisite for development approval. The 4J Planning Department has already researched the legal implications of this legislation.

One approach to such legislation would be to reclassify schools as a minimum level of urban services in Eugene's 1990 Plan. This would mean that school facilities, like sewers or public water supply, would have to be present before development would be approved. The 4J Planning Department has already investigated many of the implications of this proposal. It is assumed, however, that such legislation would be only a last recourse should the Development Information Packets or Statements of Agreement fail to influence development.

INFLUENCING INSERVICE TRAINING

The crucial need for teacher inservice training on the problems resulting from declining enrollment has already been mentioned. The effects of decline can be lessened if teachers are prepared to deal with problems like fewer resources and reduction in force.

Mary Frances Callan, in her paper "Staff Development: A Moral Commitment in an Era of Declining Enrollment", stresses the need for a staff development program for "maturing staff". She notes that when there is a moratorium on teacher hiring there is no longer an influx of young staff members with fresh ideas and insights. She suggests a staff development program that would acquaint staff with new teaching strategies, behavior management techniques, and child growth and development theories.

Callan also observes that in an era of decline there is a need for

teachers who can work in more than one subject area. She suggests courses to help staff develop new competencies. Finally she recommends that staff development in a time of declining enrollment might include alternative career counseling for teachers threatened by reduction in force.

At the very least, teachers will need to be educated about and convinced of the importance of modifying their inservice training in an era of decline. If this proves unsuccessful, the district may want to consider instituting its own staff development program or exerting more control over how current inservice funds are spent. Administrators and board members will need to weigh this issue carefully in an attempt to balance teacher autonomy with the pressing need for teacher education on declining enrollment issues.

DEALING WITH COMPLEXITY

To cushion the effects of declining enrollment, a lot of complex decisions will need to be made. These decisions will all have effects on each other and unanticipated effects on future problems. For instance, cutting costs on extracurricular activities or sports may produce more dropouts. A decision to cut transportation costs may be coordinated with a plan designed to redistribute students by busing. Cost-cutting efforts in staff development programs must take into account the increased need for staff training in a period of decline.

In other areas, public relations programs must be a part of all the latest policies concerning decline, from reduction in force, to cost cutting, to space sharing. Efforts to convince developers to build in low enrollment neighborhoods must be closely coordinated with district plans to close schools or redistribute students.

Coordinating these difficult decisions will not be easy. It will necessitate some sort of management information system. A management information system means that certain people are put in charge of coordinating and tracing the effects of educational decisions. This type of system was instituted by the state of Florida to coordinate educational decisions statewide. This system assures that

- the right hand knows what the left hand is doing
- what both hands are doing has the anticipated results

CONCLUSION

It ought to be clear by now that there are several ways the district might at least partially cushion the effects of declining enrollment. These include making cost-cutting efforts, developing public relations programs, obtaining more funds, making use of new space, coordinating with local development, modifying teacher inservice training, and instituting a management information system.

As important as some of these efforts are, they are only solutions to small parts of the problem. Even if all were implemented successfully immediately (which is unlikely), they would in no way erase the need for immediate planning concerning two urgent and difficult issues: reduction in force and school closure.

CHAPTER FIVE:

REDUCTION IN FORCE*

The rising cost of everything from paper to gasoline makes balancing the school budget more difficult every year. Inflation has and will by all indications continue to have an enormous impact on the cost of education.

The financial crunch promises to be made even tighter by the necessity for expensive new programs. District, community, and national priorities now include costly programs like increased special education, programs for the gifted, and Title IX.

As we have already seen, declining enrollment turns the screws even tighter. Per-pupil costs will go up, and school aid will go down. As necessary as the cost-cutting efforts discussed in Chapter Four may be, it is important to realize that they will not be enough to relieve the enormous financial pressure.

Staff salaries are the greatest single expense of a school district. In the next four years, as high school enrollment drops by 25 percent and per-pupil aid falls, per-pupil cost to the district for staff salaries will skyrocket. In spite of the trauma and problems associated with it, a reduction in force may be the safety valve necessary to release some of the pressure.

As was discussed in Chapter Four, money-saving policies and attempts to obtain additional funds must be made before laying off teaching and administrative staff. It will be important for staff and community to realize that all other avenues have been explored before layoffs begin. Yet staff salaries are a large percentage of the district budget. Other money-raising and cost-cutting efforts almost certainly cannot produce the funds necessary to retain all staff in the face of declining enrollment.

No matter how great the reluctance to begin a reduction in force itself,

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* Most of the specific suggestions contained in this chapter were taken from an unpublished memo on "Reduction in Force" by Susan Franklin and Lynn Neubauer.

a staff reduction plan must be formulated as soon as possible, before a crisis dictates that it is necessary. This plan is needed in addition to staff contracts which do not spell out layoff policies in enough detail. In fact, such a plan is long overdue. The district is now laying off staff without the backing of a formal plan.

Laying off teachers is an extremely traumatic situation. Being prepared to do it logically, fairly, and humanely can make things much easier for teachers and the community. A careful development of an equitable and legal policy can avoid court cases and community reprisals against board and administration.

Developing and implementing a reduction in force plan are going to be anxiety-producing tasks for board members and administrators. They will be in the position of the bearers of bad tidings and will be viewed with suspicion by those adversely affected.

To combat such antagonism, it will be important throughout for board and administrators to clearly communicate their sympathy and concern for staff and community. Policies must be made humanely with every effort to make things easier for the people involved. Those laid off must be the first rehired. The provision of retraining opportunities and other options should be considered. As Dr. Philip Piele put it, "A cold-blooded approach won't work. The board and administration must make it clear that this is an extremely unpleasant decision. The number one concern must be people."

WHO SHOULD DO IT?

The first step will be to decide who will have responsibility for development of the policy. The Oregon Department of Education publication Reduction in Force suggests several options:

- the district alone
- the district with suggestions from employees
- the district and employee representatives in the collective bargaining process

The department also suggests the district might want to consider the appointment of a committee that includes employees, students, and the general public. This committee would submit a plan to the board on a specified date.

In Declining Enrollment, the National School Boards Association quotes Superintendent G.J. Greenawait, who involved his staff in the reduction process:

> Frankly, I had no desire to establish myself or the Board as the convenient "whipping boys" for the cuts that must occur in our school district. I believe the process has kept our energies focused on problem-solving and helped us to avoid, by and large, the internal blaming that can immobilize an organization.

GATHERING INFORMATION

No matter who is responsible for formulating the plan, the first step will be to gather all relevant information. This will make it possible to logically determine positions to be cut. It will also identify staff characteristics so that fair criteria for layoffs can be developed.

The first important basic information will be the data on current and projected enrollment already discussed in detail in Chapter Three. This information will help answer the question: How many staff will be needed?

●Programs

After enrollment information is compiled, the next step will be to establish a complete picture of current and future programs in the district. At the elementary level, this information should include, for each school

- ●required academic content areas
- ●required nonacademic content areas
- ●program options and the number of students choosing them

At the secondary level, information needed, by school, will be

- ●junior high required courses
- ●senior high required courses
- ●number of sections for each course
- ●number of students enrolled in each section for the last two years
- ●plans for future offerings

Finally, information concerning current special programs must be compiled. A description of special programs will be needed, by school, for

each elementary and secondary school. These descriptions will include such programs as special education, Title I, and programs for the gifted. In addition, it will be important to determine for each school the degree of integration of each special program with the regular program.

But data on current programs are not enough. Information on future programs will next need to be collected. This will have several facets. The information must include each school's plans for future offerings or reorganization of programs. It must consider broad district goals for elementary and secondary programs. In addition, the state department of education sometimes changes its minimal standards concerning program components. These must be included.

Future program needs also may include additional programs to comply with Title IX requirements, especially in the area of physical education or vocational education. Projected changes in special education must also be included, especially those mandated by P.L.94.142. (These are spelled out in detail in Special Education in Transition by Lynn Neubauer and Jim Bardsley.) Special program changes may include more programs for the gifted. More kindergartens may also be projected. All this information will help determine where necessary program cuts might be made.

●Staff

After the program information is gathered, an analysis of the staff must be made. This analysis will include information on the staffing pattern, staff characteristics, and current and future attrition.

The first step will be to determine the positions now being filled in each school and in the central office. The State Board of Education in Reduction in Force recommends first writing a precise position description for each type of position in the district. Knowing the duties entailed in each position may be very important in determining which positions are to be cut.

Next, the number of staff members filling each position must be determined. This will include, by school, the number of

- ●administrative staff
- ●regular teachers, by grade and subject matter or content area specialty

- regular aides
- special education teachers
- special education aides
- kindergarten teachers and aides
- Title I aides
- Title I teachers
- librarians
- librarian aides
- counselors
- secretaries
- custodians
- nurses
- nurses aides
- speech therapists
- supportive teachers for special education programs (such as occupational therapist, adaptive P.E., and so on)

For the central office, the count should include, by department, the number of

- top-level administrators (superintendent and assistant superintendents)
- second-level administrators
- secretaries
- support staff

Finally, three current ratios must be calculated: pupil/teacher, administrative/instructional staff, and pupil/support staff.

After the staffing pattern has been established, staff characteristics must be determined. These characteristics, for each staff member, include

- seniority
- certification status (standard or basic)
- current and past teaching assignments
- educational preparation and postdegree training
- special qualifications and experience
- certification range (plus endorsements)
- tenure status
- sex

- race
- distribution on salary schedule
- competency/personnel evaluations

Next, these characteristics must be looked at for the staff overall. For instance, how many first-year teachers are there? How many second-year? How many teachers have tenure? are women? have special qualifications?

The next information will be extremely important. This is information about staff attrition, leaves, and lateral and upward mobility. It is important because it will determine whether normal staff change patterns alone can produce the needed cuts in staff. Data needed will include first

- the current level of attrition due to retirement and resignation
- the number of leaves requested yearly
- the yearly number of staff to move to other positions within the district

Even more important will be information on anticipated retirements, leaves of absence, sabbaticals, and changes in staffing patterns. Research Specialist Charles Stephens points out that to gather information on anticipated retirements, the staff must be analyzed by age distribution in five-year intervals to age 55, and in year intervals to age 65. This will help predict how many retirements will occur each year. He notes that future retirees must be classified by level and subject matter. If the teachers to retire in the next five years are all first-grade teachers, for example, or social studies teachers, attrition will not solve staff reduction problems. These unbalanced retirements would necessitate either the hiring of new staff or the retraining of current staff.

There is a hope that reduction in force in the next few years can be accomplished by normal attrition. Whether this is so depends largely on whether there are enough teachers retiring or resigning who come from the levels where enrollment is declining (currently high school) and are appropriately dispersed across subject matter areas.

●Finances

The need for an analysis of finances and attempts at cost cutting were discussed in Chapter Four. This same analysis and cost cutting will be a part of a reduction-in-force policy. The need for a staff-reduction plan rests primarily on finances. It will be important to have a clear picture of just how many teachers the district can afford.

MAKING RECOMMENDATIONS

After all necessary information has been gathered, the next step will be to develop recommendations for a staff-reduction plan. This plan will be based on the analysis of enrollment, program, staff, and finances just discussed. It must also include a number of other considerations.

●Concurrent Decisions

The staff-reduction plan must be closely coordinated with other administrative decisions. These include decisions to close schools or to utilize space in other ways. The plan must take note of the effects of boundary changes and busing plans. It must consider the teachers necessary to staff the magnet programs that are helping to redistribute students. It must be coordinated with inservice training programs and opportunities for staff to receive needed additional training. It must be included as a part of community relations programs. The management information system mentioned in Chapter Four may be one way to make all this coordination easier.

●Relevant Court Decisions

The staff-reduction plan must also take into account relevant court decisions concerning staff layoffs. These can be found in the Yearbook of School Law, 1976 & 1977, edited by Philip Piele. Piele summarized these cases in a personal interview recently by saying that the courts have usually upheld board decisions to lay off staff as long as the dismissals were based on reasonable and rational policies and criteria. A more detailed analysis of these cases must be part of the staff-reduction plan.

●Policies and Legislation

Those formulating the plan must be certain that the policies are within the constraints of state and federal legislation. Title IX and affirmative action requirements must be considered. The state school board policies regarding student-teacher ratio, especially in the comprehensive high school, must be complied with.

In addition, those developing the plan must be aware of Oregon State policies and recommended procedures for staff reduction. These can be found in Reduction in Force, published by the Oregon State Department of Education.

●Other Input

The State Department of Education publication mentioned above stipulates that the board should 1) announce that the reduction-in-force plan is to be considered at a regular or special meeting and 2) request input from interested parties as to alternative plans. The board should then consider all these alternatives when arriving at a plan.

●Attrition

The recommendations should include guidelines for both stimulating and responding to employee attrition. Techniques for stimulating attrition include incentives for early retirement and elimination of all leaves.

Techniques for responding to attrition might include an automatic job review for any position vacated. The job review would ask several questions. Could the job be

- ●eliminated?
- ●filled by a less qualified person?
- ●split among other staff members?
- ●reduced in scope?
- ●filled from within the organization by a person whose job is less essential?

●Adjusting Ratios

A staff-reduction plan must contain recommendations for adjusting administrative and instructional staff ratios. Recent literature should be reviewed concerning the ideal ratio of

- ●total staff to students
- ●support staff to students

- teaching staff to students
- support staff to teaching staff

Of relevance is Class Size, a review by Sydney Thompson of current literature on student/teacher ratio. As has been mentioned, when considering adjustments in student/teacher ratio, state board of education requirements must be considered.

In addition, recommendations must be made concerning administrative/instructional staff ratios. Here, too, relevant literature should be explored. It will be important to consider whether reduction in administrative staff should be "porportional" or "lagged". Reasons why it is difficult to reduce administrative staff in direct proportion to students are discussed in Chapter Four.

Alternative administrative patterns could also be explored. Eugene already has some schools with part-time administrators. The effectiveness of this type of arrangement might be studied along with the feasibility of extending it to other schools. (The Small Schools Task Force Report has recommended that this practice be eliminated.) Using principals as part-time instructional staff is another possibility.

- Cutting Positions

Which positions must be cut? This is the core of the staff-reduction plan. The plan must contain recommendations for determining the positions to be cut by grade, by school, and by department. These recommendations must consider

- the adjusted staff ratios just mentioned
- program needs
- district goals
- accreditation requirements
- minimal competency exams
- state department of education minimal standards
- federal and state legal mandates
- enrollment predictions

In considering program needs, one important aspect will be the comprehensive high school. Can all the high schools in Eugene remain as comprehensive high schools when enrollment is declining? Would specialized

high schools, formed by concentrating students of similar interests, mean that less staff would be needed? If every high school offers every course, how small will classes become?

●Laying Off and Retaining Staff

Also of extreme importance will be the criteria for selecting which staff are to be retained and which laid off. Making sure that criteria are reasonable and fair can spell the difference between acceptance of and strong reaction against the plan. Vague criteria will not hold up in court cases. Each component of the criteria must be carefully evaluated.

One of the first criteria to be considered for such a plan is usually seniority. Seniority may include number of years

- ●of service in the district
- ●in current assignment
- ●in current certification area
- ●of total teaching experience

Most plans place seniority high on the list of criteria partially because it is so easily measurable. Others disagree. Raymond Schultz in "A Sane Approach to Staff Reduction" points out that retaining only teachers with highest seniority will offer the least financial relief, contribute to a faculty age imbalance, and cause affirmative action problems. He recommends a modified seniority system that would retain "essential faculty" or those who can be documented to be of great importance to individual programs and the institution. The key, of course, is the word "documented", since vague evaluations won't hold up in court.

Besides seniority, other criteria that may be used in retaining and laying off staff include:

- ●certification status
- ●teaching assignment
- ●education preparation and postdegree training
- ●special qualifications and experience
- ●certification range (plus endorsements)
- ●availability of other employees with skill and training to fill positions needed
- ●tenure status
- ●competency

Many would place the criterion of merit or competency higher on this list. Competency, merit, effectiveness, and performance are all qualities everyone agrees are important but few presume to measure objectively. The Oregon State Department of Education in Reduction in Force suggests that competency or performance may be at least partially determined by the rating contained in the annual employee evaluation. M. Chester Nolte, in the article "How to Tell Which Teachers to Keep and Which to Lay Off", suggests that districts retain staff who demonstrate "effectiveness" as demonstrated by student achievement.

An important basis for making recommendations about which staff to retain will be agreements with the Eugene Educational Association. Representatives of the association may be contacted for relevant information. All stipulations of the contract must be carefully considered.

●Affirmative Action

What will a staff-reduction plan do to programs like Title IX and affirmative action? Will the recently hired minority and female staff members be the first to be fired? Should they be? The Oregon State Department of Education stipulates that equal opportunity must be provided for retention without regard to "race, ethnic origins, religion, sex, age, or handicap." It also reminds that in the areas of sports and physical education, equally skilled persons must be employed for girls' and boys' activities.

Must the plan consider more? Personnel Assistant for Affirmative Action George Russell warns in his Affirmative Action Report that a plan based on strict seniority criteria would "severely hinder the district's attempts to take affirmative action and to maintain even a reasonably balanced workforce." For example, he notes that

> This past year was perhaps the best we've had in terms of hiring minority teachers at the secondary level, but because of their temporary or probationary status these gains are in real jeopardy. There is a very real possibility that in the next two years we could have fewer minorities at the secondary level than we had in 1975.

Greg Downey has suggested one plan in his article "What School Boards Do When That Irresistable Force Called RIF Meets That Immovable Object Called Affirmative Action". He suggests that a district might

use seniority as its principal criterion for reduction until reduction unduly affects affirmative action staff. One rule might be to maintain the same percentage of affirmative action staff as at the beginning of the year prior to reduction. Whatever plan is chosen, those who formulated the plan must be aware of how it will affect Title IX and affirmative action requirements.

●Providing Options

The staff-reduction plan will be much easier on everyone if some options are provided for staff whose positions are cut. Two options are upward or lateral movement. Can laid-off staff members move to other positions? The Oregon Fair Dismissal Law (ORS 342.865) demands that districts must make "every effort" to transfer laid-off teachers to other positions for which they are qualified. The plan may also specify that staff members are to be given priority when other positions do open. (It will be necessary, of course, to be sure this practice does not interfere with affirmative action and Title IX hiring requirements.) Another possibility may be long-term leaves of absence. Will it be possible to assure laid-off staff of future positions?

Another option is retraining. Can staff be retrained for current or future available positions? Will the district help to pay for this training? Can training be part of a staff-development program? What about substituting "study leaves" for layoffs? The district's ability to provide such options depends largely on its ability to project what positions will be available.

Another option might be to substitute early retirement for layoff. Unless teachers voluntarily choose this option, it may be of limited effectiveness, since the staff close to retirement are usually those with highest seniority, who are the last to be laid off.

Job sharing may be another option attractive to those to be laid off. Joan Kalvelage and her colleagues in Reductions in Force and Affirmative Action recommend job sharing as a way to "redistribute available positions among employees without reducing their numbers." The authors see this as a prime way to cut positions without cutting affirmative action staff. They note that job sharing allows employees to complete their education, reduces absenteeism and tardiness, and usually results in greater productivity.

They feel teachers working half time bring additional energy and enthusiasm to the classroom. Furthermore, employment of part-time teachers allows a broader curriculum.

A district that cut 50 positions could make 50 remaining positions half time and offer these as alternatives to layoff. Of course, this approach would have to be carefully coordinated with agreements with teacher unions.

Provision of real alternatives to laid-off staff can accomplish much toward relieving the desperation that many may feel.

DEVELOPING PROCEDURES

After basic recommendations for the plan are made, procedures must be developed. These procedures include guidelines for implementation of the "Fair Dismissal Law" for

- probationary teachers
- permanent part-time teachers
- permanent full-time teachers
- support staff
- administrators

In addition, all due-process, right-of-appeal, and grievance procedures must be specified. Finally all rehiring procedures need to be outlined. All these procedures are discussed in the Oregon Department of Education handbook Reduction in Force.

MAINTAINING AND IMPROVING THE PROGRAM

A staff-reduction plan must finally contain suggestions about maintaining and improving the quality of the program.

- Equal Opportunity

When criteria for retaining and laying off staff are developed, some method for redistributing retained staff will have to be developed. It is important that staff cuts don't leave some schools with an all-around poorer staff. The staff reduction may be a good opportunity to improve overall quality by redistributing staff so that all schools share equally the most qualified, experienced, and competent teachers.

●Functioning With a Reduced Staff

Other suggestions might be made concerning how to have a high quality program with fewer staff. Combining several grades into ungraded classes has often had good academic results. A team-teaching approach might make it possible for a small staff to better serve more students. This could include specialization of teachers in subject areas across grades.

CONCLUSION

A staff-reduction plan is many-faceted and far-reaching. It must contain many considerations and components. It will affect many people and many other decisions. The time for a coherent, widely-disseminated staff-reduction policy for the 4J district is long overdue. The challenge now before the district is to rapidly formulate a plan that is all-encompassing, logical, fair, and humane. It will not be easy.

CHAPTER SIX:

CLOSING SCHOOLS

Almost everyone agrees that school closure ought to be a last resort for a school district. Yet, as enrollments continue to drop, and this drop is concentrated in certain areas, Eugene at least will have to consider this prospect. When does a school become too small to keep open? Does it ever? Is the neighborhood school concept so important that schools should be kept open no matter what? Can schools be closed without strong reactions from the community?

As class size drops, schools become more costly per student to run. Maintenance costs remain the same. Administrative costs remain the same or almost the same. The district must begin now to determine whether school closing is likely to become necessary, and if so, determine which schools to close and how to accomplish it successfully.

If planning does not begin well ahead of the time it is needed, and a crisis does force the closure of some schools, avoiding repercussions will be very difficult. Like all the other plans mentioned in this report, a plan for school closure must be long-range and carefully thought out. The Educational Facilities Laboratories in Fewer Pupils/Surplus Space explains

> There is evidence that some administrators and school boards without a plan have blown themselves and their schools clear out of the water. Such an emotionally laden problem as closure needs factual analysis and a well-based justification. Communities with a plan are noticeably more successful in closing schools.

DOES IT MAKE SENSE?

Many political and value-based considerations surround school closure. Before discussing these, however, it is necessary to discover whether closing schools would really solve any problems for the district. Is there or will there be a need for it? What would it accomplish?

●Enrollment and Staffing

The first step, of course, is a solid base of information. Much of this information is the same information needed for a reduction in force

plan. This information includes:

- enrollment and projections by schools (discussed in Chapter Three)
- staffing patterns and projections by school (discussed in Chapter Five)

Some of the information will be unique to this issue. One thing that must be done is an analysis of enrollment as percentage of capacity for each school.

- Capacity

Are schools filled to capacity? If not, how full are they? What is "capacity"? These questions are deceptively simple. The answers aren't. The "capacity" of a school merely means how many students a school can hold. Yet the School Capacity and Utilization Report lists five kinds of school capacity. The one most relevant here is "program capacity".

Program capacity is the definition of capacity that of all the definitions includes the least number of students. It sets an upper limit of 25 students per classroom and "recognizes reduced capacities for special education programs".

Most analyses, including this report, measure school capacity by program capacity. Yet the Small Schools Task Force Report sets forth the belief that even program capacity is too high. They believe schools are expected to hold too many students. They recommend

- decreasing program capacity for kindergarten classrooms
- counting some classrooms as ancillary space in schools that have less ancillary space
- decreasing program capacity for schools with Title I programs
- decreasing program capacity for small classrooms

This would mean that some schools would have lower capacities than they do now. For instance, schools that are now 70 percent full might be rated as 80 or 90 percent full. The report warns, however, that if these changes are made, the over-capacity schools in the North and Sheldon Regions will become even more over capacity.

Those making decisions will need to choose a definition of capacity with an eye to its repercussions all over the district. After the definition is chosen, both under-capacity and over-capacity schools must be

identified. In making these calculations, also to be taken into consideration are unique facilities in each school like modular arrangements or vocational education facilities

After current capacities are calculated, future capacities must be projected. Besides enrollment projections, future capacity calculations must consider the effects of any suggestions in Chapter Four that are to be implemented. These possible changes include grade structure reorganization, attendance boundary changes, institution of more magnets, finding other uses for school space, and coordination with local development.

●Costs

The operational costs of all schools in the district must then be calculated and compared. These should be figured per school and also per pupil for each school. How expensive are under-capacity schools to run? This calculation must include such items as

- ●transportation
- ●operation
- ●maintenance
- ●health and counseling services
- ●food services
- ●fixed charges
- ●capital outlay
- ●teachers' salaries
- ●administrators' salaries

Next must be calculated how much could be saved by closing under-capacity schools. This is a more complicated calculation. Savings will depend largely on what is done with closed schools. Will they be sold? Will they be merely boarded up and minimally maintained until needed again? Will they be used by the district for other uses?

The least amount of revenue to the district, of course, will result from merely "mothballing" schools for future use. These schools will continue to have maintenance costs and may have vandalism costs as well. The Small Schools Task Force Report estimated that the savings from mothballing small schools in Eugene would run from $17,000 to $50,000 annually for the first five years. The revenue produced by other uses will depend

on a number of factors, among them, how old the building is, how much remodeling will be needed, how much buyers or lessors are willing to pay. Also to be figured in is the age and condition of all 4J buildings. Are some due to be closed from old age anyway? Will some need extensive repair and remodeling to stay open? Calculations of savings must also subtract additional busing costs created by the closing.

Whether to include teacher salaries in money saved is a debatable issue. The Small Schools Task Force Report has argued that salaries should not be counted. The report stresses that as long as a small school maintains the same student/teacher ratio as the rest of the district, merely closing that school won't allow the district to lay off any more staff. Therefore, the amount of staff in the district will remain the same when a school is closed, and salary savings will not be realized. This conclusion makes sense as long as enrollments do not drop so low that it is impossible to maintain the district staff ratio. Maintenance of the district staff ratio may be more of a problem in secondary schools than elementary.

●Alternatives to Closure

Before making a decision about whether to close any of the district's schools, alternative ways to solve problems need to be considered. Some alternatives have already been mentioned in this chapter. All have been discussed in Chapter Four. These include

- ●cutting costs and obtaining more funds
- ●reorganizing the grade structure
- ●changing attendance boundaries and busing students
- ●establishing more magnet programs in under-capacity schools
- ●using parts of underfilled schools for offices or storage
- ●leasing out parts of underfilled schools
- ●abolishing the comprehensive high school

Two of these will probably have the greatest potential effects: busing students and putting extra space to other uses. Whether these are both practical and acceptable to this community is an open question. Reorganizing the grade structure might be most useful coupled with reduction in force. If school populations become so small that staff ratio cannot be

maintained, consolidating students might be effective. Two K-6 elementary schools might become one K-3 school and one 4-6 school, thus making fuller classes possible. Such an approach would presumably be even more effective if excess school space were also used for other things. As mentioned before, reorganizing the grade structure would also be useful if some grades in a region were over capacity while others were under capacity.

The alternative of doing away with some or all of Eugene's comprehensive high schools was discussed in Chapter Five. It may be possible that closing a high school at least could be postponed by instituting more specialized high schools. Courses might be fuller if every high school doesn't have to teach every course. In that case, of course, students would have to have free choice about which high school to attend.

POLITICAL CONSIDERATIONS

One reason alternatives to closure need to be considered carefully is that school closure is such an explosive issue. Judith Brody, in "How to Close a School and Not Tear Your Community Apart in the Process", quoted Atlanta's Assistant Superintendent Darwin Womack, who said of school closure:

> It is a very emotional, fearful, traumatic issue. The people in the community fear that closing a school is the end of the community, that it will go downhill.

As important as the nuts and bolts question of whether closing schools saves money is the question of how the community will feel about the closure. Parents of elementary students are strongly committed to the neighborhood school in walking distance from home. Graduates of local high schools remain fervent about the old Alma Mater and can't bear to see her die. Many fear that when schools close, property values will fall and the neighborhood deteriorate. Nationwide, school closings have incited strong repercussions. School boards have been voted from office and administrators not rehired.

Yet avoiding school closure and winking at underfilled schools in Eugene may not be easy either. Some schools on the fringes of Eugene are bulging. As schools in the south and central city become emptier and more

expensive to run, parents in the suburbs may demand an equal amount of space for their kids. In 4J, a strong effort is made to divide the education dollars equally among schools and students. Equality of educational opportunity demands it. Yet parents may argue that real equality demands an equal distribution of space, too.

●Commitment to the Central City

Yet another closely related issue is the city of Eugene's commitment to the preservation of the central city. City planners, alarmed by the deteriorating downtown and central areas in larger cities, don't want it to happen in Eugene. They see school closing as the beginning of the end of the residential character of the central city.

This issue is clouded by the fact that most parts of Eugene's central city are nothing like the ghetto areas at the core of most larger cities. In fact, if the University area is included as "central city," the area is wealthy indeed, with property values that make housing prohibitive for most young families.

In other large cities, central schools are closing because poor-quality education and the threat of violence makes them unattractive to parents. Instead, people move to the wealthier suburbs or send their children to private school. Yet, in Eugene, many of the underfilled schools are in the nicest neighborhoods. Teachers and facilities are high quality, and violence is not a threat.

All this leads back to the issue of equality of educational opportunity. Like motherhood and apple pie, a commitment to the health of Eugene's central city is a lovely idea. However, like motherhood, but unlike apple pie, the implications of this commitment can be extremely expensive. Who will pay to keep underfilled schools open? Is it fair or even legal for money set aside for the education of all children to be used to maintain the vitality of the central city? Is the goal important enough to the city of Eugene for the city to pay the bill?

●Busing

Possible community reactions to busing were mentioned in Chapter Four. In some communities, parents simply refuse to bus their kids and won't stop short of violence to make sure it doesn't happen. In others, there

isn't much more than mild grumbling, and a plan is instituted smoothly. Success of limited busing in Eugene may indicate that busing might be one answer to underfilled schools in some neighborhoods and overfilled in others. As mentioned earlier, success of busing usually depends on good planning, strong support by administrators and board members, and good community involvement and human relations.

●Can Schools Be Closed?

In spite of the dreary picture painted earlier of the political repercussions of school closure, schools have also been closed successfully all across the country. Des Moines, Iowa, Pasadena, California, Seattle, Washington, and countless others have all closed schools smoothly. The Schools and Neighborhoods Research Study by Donald Eisman and Nancy Burton, a detailed study of the effects of closure in Seattle, indicates that results were not nearly so dire as anticipated. Crime did not increase. Property values did not drop. Vandalism of school property remained the same. Residents remained satisfied with their neighborhoods.

As has been mentioned so many times before, success of such efforts by school districts appears to depend more on how they are done than on any other factor. Good planning and community relations are the keys.

DEVELOPING A PLAN

If it is ascertained that school closure is a possibility that cannot be completely ruled out for Eugene, a plan must be developed. Like other plans to be used in case of disaster, this one must be developed before disaster hits. It should also have enough flexibility built into it so that if the situation changes, appropriate responses can be made. As mentioned before, a plan for closure should assume that closure will be a last resort for the district and that other alternatives will be tried first.

●Community Input and Public Relations

The first step may be merely communication. The community must be informed of the problem. The Educational Facilities Laboratories' report Fewer Pupils/Surplus Space suggests

> The first step is to present numbers showing the decline in enrollment for the district as a whole. Only after these have been assimilated, digested, and accepted, can one venture to talk about the specific implications this decline may have for closure -- especially for the closure of a particular school.

This communication can be accomplished through news releases, flyers sent home with children, and presentations to community groups.

The next step may be to provide an opportunity for communication to flow in the other direction. How does the community feel about the problem? What does it think should be done? How much is it willing to pay?

Some districts have used community surveys to learn community opinion. Others have appointed task forces to study the problem and make recommendations. Still others have public hearings. These are all time-consuming and often frustrating, but, according to all major studies of school closure, invaluable in avoiding negative community reactions later.

●Developing Criteria

Those in charge of developing the plan to be used in the necessity of school closure will need first to decide who will make the final decisions about closing a school if the time comes. They must then select the criteria to be used when closure of a specific school is being considered. They will probably want to consider

- ●enrollment factors
- ●capacity
- ●cost factors
- ●location in relation to other neighborhood schools
- ●adequacy of the facility
- ●political reaction

All the information mentioned earlier, gathered when weighing the efficacy and feasibility of school closure, will be needed.

●Plans for Disposal

The next step is to develop alternative ideas concerning how closed schools might best be used. It's important to remember that almost everybody is guessing that enrollments will be up again by the year 2000. Are some schools in good enough shape that they can be opened again when needed?

If so, then leasing buildings or using them for other district needs may be the best plan. "Mothballing", too, may be considered. Otherwise, selling may be the best option.

CONCLUSION

In many districts across the nation, enrollment decline has produced school closures. Deciding whether this will be true in Eugene involves many considerations. These include everything from facts (like numbers of students and dollars) to intangibles (like neighborhood feelings and equality of educational opportunity). The decision will be closely tied to decisions about reduction in force and to how much financial support the community is willing to give schools. Handling the problem successfully will demand careful thought.

SUMMARY AND CONCLUSIONS

FOR WANT OF A NAIL

For those who have dealt with the complex problems stemming from growth, declining enrollment may at first seem like a welcome relief. It signals an end to the pressing needs for more classrooms, more staff, more administrators, and more money that schools faced in the sixties.

Yet, as the preceding pages demonstrate, only the seldom-achieved state of equilibrium (when there is neither growth nor decline) allows relief to school people. Declining enrollment causes as many problems as growth does and is almost as expensive. And unlike growth, it isn't accompanied by an increase in aid based on numbers of students.

At first glance, declining enrollment may seem as inconsequential a problem as a mere loss of a nail. It is at first difficult to imagine its far-reaching and many-faceted effects or to conceive of all the factors that affect it.

We have seen that the problem of declining enrollment is in fact two separate but interrelated problems:

- overall declining enrollment
- under-capacity schools in some neighborhoods and over-capacity schools in others (locational mismatch)

These two problems intertwine to produce two major effects:

- an oversupply of staff
- an oversupply of space

And these in turn make necessary the consideration of two major courses of action:

- reduction in force
- school closure

Deciding whether to implement these courses of action and how to implement them requires a myriad of additional decisions. These involve (among other things):

- enrollment, program, and staffing projections
- school costs
- public relations programs
- equality of educational opportunity

- alternative use of school space
- land use and development in Eugene
- the neighborhood-school concept
- busing
- student/teacher ratios

They even touch such diverse considerations as inservice training, the comprehensive high school, and the need for a management information system. They affect and are affected by magnet, special education, and affirmative action programs.

Each decision made will affect every other decision. Making and coordinating these decisions won't be easy. Yet with care and forethought, it can be done. As was mentioned so many times in the preceding pages, handling these problems effectively depends upon two things: communication and careful planning. Finally, their solution requires that administrators, school board members, teachers, and citizens all remember that they are joined in a common goal: the best possible education for all the children in the district.

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